

Agency manager/Team lead

Proficiency level

- X New Gen AI skills
- X Transferrable skills at the same proficiency level
- X New skills
- X Transferrable skills at a higher proficiency level¹

Skills Framework track	Sales, after sales, distribution and relationship management	Job function	Sales and marketing	Job family	Agency
Sub-sectors	Insurance	Expected augmentation by Gen AI	Do more and do new: Gen AI can develop training materials based on industry best practices, which can be used to facilitate the training and development of team members. Gen AI tools can also recommend sales and customer acquisition strategies, and develop lead-generation opportunities; outputs from Gen AI tools can also be directly used by the Agency Director/Segment Lead		

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage the team's recruitment, development, and performance	Design reward schemes to motivate team members on generating leads Train and develop team members and ensure they are updated on product knowledge, policies, and procedures
Grow agency business offerings	Propose new channels for sales growth Keep abreast of legal and regulatory compliance requirements Evaluate local industry product and regulatory trends and developments Formulate the organization's criteria for market segmentation and customer selection Formulate sales strategies and targets for the different products and drive the organization's cross-selling abilities Develop lead-generation opportunities to deepen and strengthen partnerships Drive development of the organization's product and service offerings
Acquire and manage customers	Disseminate compliance and regulatory frameworks to teams Formulate customer acquisition strategies and organizational propositions to position the organization Ensure adherence to claims processes and procedures

New Gen AI skills

Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

Additional skills required for potential redesigned role

Role 1: Claims liaison manager (adj. ² Score: 0.51)					
Ethical culture	4	Sustainable insurance and re-insurance solutions and applications	3	Continuous improvement management	4
Stakeholder management	4	Customer experience management	5	Data collection and analysis	4
Product advisory	4	Regulatory compliance	4	Insurance claims handling	5
People performance management	4	Fraud risk management	3		
Role 2: Client support manager / Account manager (adj. Score: 0.50)					
Ethical culture	4	Customer relationship management	4	Business opportunities development	4
Market profiling	4	People performance management	4	Quality assurance	4
Stakeholder management	4	Sustainable insurance and re-insurance solutions and applications	4	Standard operating procedure development	4
Product advisory	4	Sustainability risk management	3	Business needs analysis	4
Account management	4	Non-financial-industry sustainability developments	3	Sales strategy	4
Business performance management	4	Climate change management	3	Service challenges	4
Customer experience management	4	Continuous improvement management	4		

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework